Consultant Training to Support APSR and Revised Update Process

Version 1.0

Internet Edition

APSR Defined

- Active Project Status Report
  - A new ADOT project management information product to be generated at four week intervals.
  - Facilitates improved exposure to schedule milestones.
  - Will be available to the customers and stakeholders on ADOT's internet site.
  - Will ultimately replace several existing reports.
  - Report and driving process will evolve via a continuous improvement cycle.

Who are the Customers & Stakeholders ?

- ADOT technical leaders and managers
- Statewide program & project management
- Valley Project Management
- Consulting firms
- Construction companies
- The general public
- ADOT Director's Office

Why do we need a process revision?

- Existing process cannot support the increased granularity of the published information.

- Inform ADOT technical areas and consultants of current priorities and required stage/clearance completion dates.

- Ensure a centralized and consistent view of all design projects. Comprehensive 5 year program status.

What is the process?

Comparison to Existing Process

- This is Phase I of a multi-phase process.

- Schedules now will be prepared according to a revised set of detailed guidelines.

- Update timing will be revised - See calendar

- PPMS will maintain a database of initial planned milestone dates per project.

Roles in the Process

- ADOT Project Managers
  - Final reviewer of scheduling information for each project. "Review Window" using the PM Report.
  - Updates project comments via PM Report.
  - Works with consultants and/or ADOT TL's to reduce impact of missed activities.
  - Represents project team at the PRB.

Roles in the process

- Consultant
  - Submits baseline CPM schedule to PM & PPMS up to 6 weeks after a project kickoff.
  - Submits updates according to calendar – either by completing and returning spreadsheet or complete schedule copy.

Roles in the process

- Technical Leaders
  - For projects completed by in-house staff, the ADOT TL will complete spreadsheet and submit to PPMS.

- PPMS
  - Centrally organizes data from the multiple sources. Provides compilation and distribution of APSR.
  - Continuously improves the process.

How will it impact other processes

- Replaces existing update process and products.
- The existing reports are compatible with the new process.
- Pre-Design & Local Government scheduling will undergo similar process revision within one year.
- Total ADOT project management information base is expanded.
- No data is lost in this process enhancement.

Procedures for Consultants to Implement the Guidelines

Critical Concepts

- 20 standard milestones & flags for each target schedule (after kickoff) - if applicable to the project.
- 5 fixed milestones prior to kickoff.
- Dates are widely published in APSR.
- Schedule Change Control.
- Primavera compatible tools ensure data compliance.

APSR Data Foundation = The Schedule

- P3 compatibility is required.
  - P3, Suretrak
  - MS Project users must coordinate individually with PPMS.

- 5 Milestone Schedule for pre-kickoff
  - This is in place of the current "generic models."
  - Developed by the ADOT PM in consultation with PPMS.

Customized Schedule

- Create within 6 weeks of kickoff.
- Must contain required list of 20 flags & milestones (as applicable).
- Must include all involved technical disciplines.
- Should follow ADOT Project Development Process Manual. Exceptions must be approved.
- Should be acceptable to the project team.

Creating the CPM Schedule

Coding Structure & Project Shell are available for Internet Download

- Use ADOT Base Calendar 1
- Code Activity ID's
  - Position 3: Phase
  - Position 4: Stage (design)
  - Position 5 & 6: Standard Activity Types
  - Positions 7-10: Sequencing to avoid duplicate
- "ADOT PROJECT TIME MANAGEMENT GUIDELINES" document contains detailed coding structure.

Milestones and Flags (20)

- Represent major project events.
- Appear directly in APSR.
- Flags are automatically statused by predecessor activities.
- Milestones must be statused manually
- Bid Date is constrained with a Mandatory Finish and cannot be changed without PRB action.

Activity Coding

Coding Structure & Project Shell are available for Internet Download

- ## RESP – Responsible Area
  - Identifies proper engineering discipline per activity.
  - 3 characters total. 3rd character of "C" indicates a consultant is responsible for the activity.
  - Required for all activities and milestones.

Activity Coding

- TCLD – Technical Leader
  - Indicates ADOT Technical Leader responsible for each deliverable.
  - Used when RESP is an ADOT team.
  - Left blank if Consultant or Subcontractor are performing the work.
  - Clearances (environmental, R/W, Utility, etc) must be coded with an ADOT TCLD.

Activity Coding

- DSNC – Design Consultant / Scheduler
- Two components to this code
  - First two positions: Identify firm
  - Next three positions: Initials and sequence #

Activity Coding

- PMGR – Project Manager
  - ADOT Project Manager
  - PPMS defines these codes and will provide to consultant (available in project shell on Internet).
  - Coded on each activity in the project (same value for each activity).

Activity Coding

- CPSN – Critical Path Schedule ID Code
  - Unique 4 digit identifier
  - Coded on each activity in the project
  - Without a correct CPSN, the project will appear blank in APSR.

Project Target Dates

- PPMS receives and approves first customized schedule.

- Target dates are extracted by PPMS and stored external to master schedule.

- Target dates for stages are listed on APSR.

- These dates are only changed under certain circumstances.

- Consultant should save copy of original schedule for reference.

Activity Status Update Procedure

Update Window

- PPMS initiates activity status update process by sending SURF spreadsheet to everyone with activity update responsibility.

- Consultant may populate spreadsheet and return.

- Updates to logic will require an entire schedule backup.

Keys to a Quality Update

- Communication with PM and Project Team.
- Changes should not negatively impact targeted bid advertisement date.
- Changes to original durations, logic, and adds/removals of activities should be documented in advance of a submittal of schedule back-up.
- All required codes should be in place.
- Consultant schedule must use ADOT calendar and Data Date. (Resources available on Internet).

Review Window

- PM Reviews project status via PM Report
- If PM requires a change in activity status:
    - Inputs new data to form
    - Notifies consultant or ADOT TL of the change
- PM Updates project comments
- PM has the final review of project milestone status prior to APSR production.

The objective of
Continuous Improvement will
drive this process.